## USDA Weekly Retail Turkey Feature Activity

Fri. Oct 05, 2012

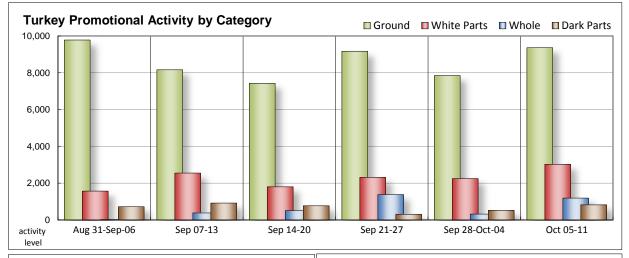
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 10/05 thru 10/11.

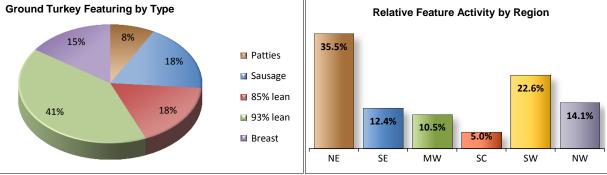
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

(prices in dollars per pound fresh unless otherwise noted;											
NATIONAL SUMMARY											
	THIS	WEEK	LAST	WEEK	LAST YEAR						
Feature Rate 1/	37.2%	of 22,500	35.9%	of 22,500	37.1% of 19,500 outlets 0.4%						
reature Kate	ou	tlets	ou	tlets							
Special Rate 4/	1.	3%	0.	.0%							
Activity Index 2/	15	,540	12	,900	15,460						
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg					
WHOLE BIRDS:											
Fresh - Hens											
" - Toms											
Frozen - Hens	610		160		900	1.09					
" - Toms	580	1.02	160	1.18	900	1.07					
PARTS:											
Breast:											
Bone-in, whole											
Fresh	10	-	10		320						
Frozen	790	1.68	1,090	1.85	850	1.74					
Split, bone-in											
Fresh					40						
Rotisserie	820		210		960						
Boneless, whole	30	3.94	60	5.59	70	4.85					
Cutlets	720	4.86	150	5.02	440	4.63					
Cutlets, thin sliced			100	4.99							
Strips	170	4.99									
Tenders	480	4.49	630	4.46	170	4.85					
Marinated Tenders	320	4.53	810	4.24	730	3.90					
Drumsticks	360	1.93	20	1.79	520	1.81					
Thighs	10	2.29	10	1.98	210	2.03					
Wings	310	1.97	20	1.99	520	1.81					
Necks	60	1.87	10	1.59	30	1.84					
Smoked Drumsticks	30	1.99	160	1.94	110	2.40					
Smoked Wings	30	1.99	160	1.77	40	2.22					
Smoked Necks	20	1.99	140	1.69	50	1.88					
<b>GROUND TURKEY:</b>	9,360	3.46	7,850	3.43	7,440	3.06					
Patties	740	3.64	820	3.59	740	3.19					
Sausage	1,720	3.23	1,000	3.18	1,650	2.96					
85% lean	1,630	3.14	1,070	2.47	1,250	2.28					
93% lean	3,830	3.15	2,530	3.01	2,890	2.98					
Breast	1,440	4.80	2,430	4.49	910	4.46					
Rolls (frsh/frz 1 lb.)	310	2.73	370	2.68	640	2.58					
Specialty 5/											
Patties	80		40		250	-					
93-94% lean	430	_	480	_	30						
Breast	10		260		240						
Note: rolls & specialty no	ot included	d in ground	turkey tot	al and weigl	hted avera	age.					

This Week's Turkey Feature Highlights

Feature activity increases going into October. Offerings are active on frozen hens and toms; prices are lower. Could this be a hint of what to expect for holiday sales? Fewer stores are promoting frozen bone-in breasts, but there are still plenty to choose from and prices are lower this week. Promotional activity increases on rotisserie breasts; they make a good choice for a quick meal. Shoppers looking for boneless white parts will find more ads on cutlets, fewer on tenders and marinated tenders. Dark parts are fully represented; this week fresh dark parts are the most actively promoted. Ground turkey can be found in many circulars this week; prices are higher on all grinds. Offerings are most active on 93% lean; the weighted average price on 93% lean is almost as low as the 85% lean. Deli promotions have taken off, mostly due to very active featuring on self-service deli items. Retail feature activity slows on service deli; prices are mostly higher. Promotions are most active on the thin slicing meats. Self-service deli feature activity increases on all items; prices are mostly lower.





All report information gathered from publicly available sources including store circulars, newspaper ads, and retailer websites.

1/ Feature Rate: the amount of sampled stores advertising <u>any</u> reported turkey item during the current week, expressed as a percentage of the total sample. 2/ Activity Index: a measure of the absolute frequency of feature activity equal to the total number of stores for each advertised turkey item (e.g., a retailer with 100 outlets featuring 3 turkey items has an activity index of 300). 3/ Stores/Avg: the total number of advertising outlets and the weighted average price weighted by the respective number of outlets. 4/ Special Rate: the percentage of sampled stores with a no-price promotion (e.g., buy 1, get 1 free, etc.) 5/ Specialty: products produced from birds raised on an all vegetable diet without antibiotics and minimally processed.



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(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

	NORTI	HEAST U.S.		SOUT	HEAST U.S.	MIDWEST U.S.  (IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI)  27.2% of 4,000 sampled outlets 2.8% of stores w/ no-price promotions				
	(CT,DE,MA,MD,N	IE,NH,NJ,NY,PA,F	RI,VT)	(AL,FL,GA,M	S,NC,SC,TN,VA,W					
Feature Rate 1/	·	00 sampled outle		·	00 sampled outle					
Special Rate 4/	1.3% of stores w	•		·	w/ no-price promo					
Activity Index 2/		Index = 6,470			/ Index = 3,080		Activity Index = 1,740			
Activity index	Price Range	Summar	V	Price Range	Summar	W	Price Range Summary			
	(\$/pound)	Stores Wtd Avg		(\$/pound)	Stores Wtd Avg		(\$/pound)	Stores Wtd Avg		
WHOLE BIRDS:										
Fresh - Hens										
" - Toms										
Frozen - Hens	0.99	200	0.99	0.99	190	0.99	0.79 - 1.17	190	1.10	
" - Toms	0.99	200	0.99	0.99	190	0.99	0.79 - 1.17	190	1.10	
PARTS:										
Breast:										
Bone-in, whole										
Fresh							2.29	10	2.29	
Frozen	1.47 - 1.97	40	1.70	1.47 - 1.97	380	1.76	1.39 - 1.89	190	1.76	
Split, bone-in										
Fresh										
Rotisserie	5.99 - 12.99	720	7.64	7.99	70	7.99				
Boneless, whole	3.92	20	3.92							
Cutlets	3.99 - 5.29	680	4.83	5.29	20	5.29				
Cutlets, thin sliced										
Strips	4.99	170	4.99							
Tenders	3.92 - 5.99	210	4.90				4.49	60	4.49	
Marinated Tenders	4.79	90	4.79				3.66 - 4.66	210	4.54	
Drumsticks	1.99 - 2.29	280	2.00	1.79	50	1.79	1.38	10	1.38	
Thighs	2.29	10	2.29			-				
Wings	1.99 - 2.29	260	2.01	1.79	50	1.79				
Necks	2.29	10	2.29	1.79	50	1.79				
Smoked Drumsticks	1.98	10	1.98	1.99	20	1.99				
Smoked Wings	1.98	10	1.98	1.99	20	1.99				
Smoked Necks				1.99	20	1.99				
GROUND TURKEY:										
Patties	3.49 - 4.99	240	3.82	2.99 - 3.69	30	3.44	2.99 - 3.99	130	3.47	
Sausage	3.11 - 3.99	860	3.29	3.59	20	3.59	2.39 - 3.27	100	2.79	
85% lean	2.50	10	2.50	2.00 - 3.49	1,300	3.27	1.99 - 2.99	90	2.45	
93% lean	2.80 - 3.84	1,650	3.12	2.77 - 3.07	480	2.94	2.39 - 3.99	480	3.20	
Breast (99-100% lean)	3.76 - 5.99	390	5.32	4.99	190	4.99	3.99 - 4.55	10	4.22	
Rolls (frsh/frz 1 lb.)							1.50 - 3.50	70	2.71	
Specialty <sup>5/</sup>										
Patties	3.99 - 5.99	80	4.99							
93-94% lean	3.99 - 5.00	320	4.19							
Breast	6.99	10	6.99	202) 720 6044					0 -4	





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	SOUTH (	CENTRAL U.S.			SOUT	HWEST U.S.		NORTHWEST U.S.  (AK,ID,MT,OR,WA,WY)  31.0% of 1,200 sampled outlets  0.0% of stores w/ no-price promotions			
	(AR,AZ,CO,KS,	LA,MO,NM,OK,TX	,UT)		(C	A,HI,NV)					
Feature Rate 1/	16.8% of 4,0	00 sampled outlet	ts		51.4% of 2,9	00 sampled ou	tlets				
Special Rate 4/	3.0% of stores v	v/ no-price promo	tions	0.09	% of stores v	v/ no-price pro	motions				
Activity Index 2/		y Index = 830			Index = 2,720		Activity Index = 700				
7	Price Range Summary				Range	Summ	nary	Price Range		mary	
	(\$/pound)	Stores V	Vtd Avg	(\$/p	oound)	Stores	Wtd Avg	(\$/pound)	Stores	Wtd Avg	
WHOLE BIRDS:											
Fresh - Hens											
" - Toms											
Frozen - Hens								1.79	30	1.79	
" - Toms											
PARTS:											
Breast:											
Bone-in, whole											
Fresh											
Frozen	1.49 - 1.89	60	1.54					1.19 - 1.69	120	1.34	
Split, bone-in											
Fresh											
Rotisserie	9.99	10	9.99					7.99	20	7.99	
Boneless, whole	3.99	10	3.99								
Cutlets								5.45	20	5.45	
Cutlets, thin sliced											
Strips											
Tenders					3.99	190	3.99	4.79	20	4.79	
Marinated Tenders								3.33	20	3.33	
Drumsticks	1.48	20	1.48								
Thighs											
Wings											
Necks											
Smoked Drumsticks											
Smoked Wings											
Smoked Necks											
GROUND TURKEY:											
Patties	3.50 - 3.69	30	3.65	3.49	- 3.99	270	3.53	3.99	40	3.99	
Sausage	2.86	30	2.86		3.27	640	3.27	2.50 - 3.27	70	2.89	
85% lean	1.67 - 2.91	210	2.73		2.39	10	2.39	2.39	10	2.39	
93% lean	2.91 - 3.59	200	3.41	2.79	- 3.99	730	3.25	2.80 - 3.29	290	3.10	
Breast (99-100% lean)	4.00 - 4.16	90	4.13		- 4.79	740	4.59	3.99	20		
Rolls (frsh/frz 1 lb.)	1.99 - 2.99	120	2.68	2.33	- 2.99	80	2.67	2.99 - 3.00	40	3.00	
Specialty <sup>5/</sup>											
Patties											
93-94% lean	3.59	50	3.59		3.59	60	3.59				
Breast											



## **USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats**

Fri. Oct 05, 2012

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 10/05 thru 10/11.

(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

	N	ATIONAL	SUMMAR	RΥ			NORTHEAST U.S.		SOUTHEAST U.S.					
	This	Week	Last	Week	Last	Year	(CT,DE,MA,MD,ME,NH,NJ,NY,PA,RI,VT)			(AL,FL,GA,MS,NC,SC,TN,VA,WV)				
-1/	79.4% o	f 22,500	65.5% o	f 22,500	71.1% o	f 19,500								
Feature Rate 1/	sto	res	sto	res	sto	res	87.6% of 4.400 s	87.6% of 4,400 sampled outlets			73.5% of 6,000 sampled outlets			
			4.5		40		<b>-   </b>	Activity Index = 16,200			Activity Index = 10,640			
Activity Index 2/	51,	310	45,	020	42,	780	Price Range	Summa	ary	Price Range	Summary			
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg	(\$/pound)	Stores \	Wtd Avg	(\$/pound)	Stores V	Vtd Avg		
SERVICE DELI - Turkey									Ū	· •				
Category 1														
Processor Brand	3,770	7.94	8,170	7.78	4,860	8.12		2,410	7.92	6.99 - 9.99	480	8.62		
Private Brand	2,130	7.50	3,030	6.98	2,190	7.72	6.99 - 8.99	1,870	7.42					
Category 2														
Processor Brand	4,860	5.85	4,130	5.76	6,250	6.12	4.98 - 6.99	1,700	5.90	4.99 - 5.99	360	5.31		
Private Brand	4,240	6.24	2,140	5.90	2,920	6.89	4.99 - 6.99	1,480	5.91	5.98 - 6.99	630	6.05		
Category 3														
Processor Brand	1,050	4.02	680	3.80	1,000	3.76		440	3.96	2.99 - 3.99	360	3.95		
Private Brand	270	3.30	1,500	5.46	1,510	5.09	3.99 - 4.98	60	4.75					
Turkey Ham														
Processor Brand	430	2.89	550	4.02	480	3.25	2.99 - 3.99	220	3.14	3.99	30	3.99		
Private Brand														
Turkey Pastrami														
Processor Brand	200	4.37	660	4.54	190	3.71	3.99 - 4.99	70	4.64					
Private Brand														
SERVICE DELI - Chicken														
Category 1														
Processor Brand	2,690	7.40	3,020	7.77	3,450	7.67		1,290	7.42	5.99 - 8.99	560	7.99		
Private Brand	1,300	7.17	1,430	7.10	1,460	7.23	6.99 - 7.99	1,190	7.18					
Category 2														
Processor Brand	400	5.49	140	4.87	730	6.18	4.99 - 5.99	20	5.34	4.99	110	4.99		
Private Brand	160	5.99	10	4.94	240	6.99								
SELF-SERVICE DELI														
(dollars per tub or pouch)														
Turkey 7-10 oz														
Processor Brand	9,340	3.05	6,680	3.14	6,860	3.28		2,030	3.28	2.34 - 3.50	2,620	3.22		
Private Brand	4,870	2.73	2,570	3.04	2,500	2.88	2.50 - 3.33	740	2.85	2.47 - 2.50	840	2.49		
Turkey 16 oz	4.070	4.00	4 770	4.07	000	5 40	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	400	4.05	4.40 5.00	4.040	4.00		
Processor Brand	1,870	4.99	1,770	4.27	200	5.42	4.48 - 4.99	160	4.85	4.48 - 5.99	1,210	4.99		
Private Brand							1							
Chicken 7-10 oz	0.000	2.02	6.060	2.40	E 440	2 22	3.00 3.00	4 700	2.40	2.40 2.50	2 600	2.22		
Processor Brand	8,860	3.03 2.73	6,060	3.18	-, -	3.33 2.88		1,780 740	3.18	2.49 - 3.50 2.47 - 2.50	2,600 840	3.23 2.49		
Private Brand	4,870	2.73	2,480	3.04	2,500	∠.88	2.50 - 3.33	740	2.85	2.47 - 2.50	840	2.49		

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)





## **USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats**

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 10/05 thru 10/11.

(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

	MIDW	EST U.S.	SOUTH C	ENTRAL U.S.	SOUTHW	/EST U.S.	NORTHWEST U.S.		
	(IA,IL,IN,KY,MI,M	N,ND,NE,OH,SD,WI)	(AR,AZ,CO,KS,L	A,MO,NM,OK,TX,UT)	(CA,	HI,NV)	(AK,ID,MT,	OR,WA,WY)	
Feature Rate 1/	04.00/ -5.4.00/	9laddlad -	70.5% - 6.4.00	0	0.4.70/ -/ 0.000	lad satisfa	84.8% of 1,200 sampled outlets  Activity Index = 2,560  Price Range Summary		
		0 sampled outlets	· ·	0 sampled outlets	·	sampled outlets			
Activity Index 2/		ndex = 10,460		ndex = 7,000		dex = 4,450			
	Price Range (\$/pound)	Summary Stores Wtd Avg	Price Range (\$/pound)	Summary Stores Wtd Avg	Price Range (\$/pound)	Summary Stores Wtd Avg	(\$/pound)	Summary Stores Wtd Avg	
SERVICE DELI - Turkey	(ψ/ροατία)	Oloics Wid Avg	(ψ/ροαπα)	Otoles Wild Avg	(ψ/ροαπα)	Otores Wita Avg	(ψ/ροαπα)	Oloics Wid Avg	
Category 1									
Processor Brand	5.99 - 8.99	340 7.44	6.98 - 8.99	180 7.99	5.99 - 8.99	290 7.45	6.99 - 10.99	70 8.40	
Private Brand	7.49 - 8.99	240 8.07	7.99	20 7.99					
Category 2									
Processor Brand	4.99 - 6.99	1,570 5.72	4.99 - 6.99	780 5.88	5.99 - 6.99	180 6.34	4.99 - 6.99	270 6.68	
Private Brand	4.98 - 6.99	880 5.90	5.99 - 6.99	380 6.95	6.99	550 6.99	6.99	320 6.99	
Category 3									
Processor Brand	2.99 - 4.58	130 3.93	2.79 - 4.99	30 4.21	2.99 - 4.99	30 4.62	3.98 - 4.99	60 4.70	
Private Brand	2.78 - 2.99	150 2.93	2.79	60 2.79					
Turkey Ham									
Processor Brand	3.98	10 3.98	1.99 - 2.99	130 2.10	2.79 - 3.29	40 3.03			
Private Brand									
Turkey Pastrami									
Processor Brand	3.98 - 6.99	50 4.59	3.99	40 3.99			3.98	40 3.98	
Private Brand									
SERVICE DELI - Chicken									
Category 1									
Processor Brand	5.95 - 8.99	430 6.62	5.99 - 8.49	150 6.89	7.49	240 7.49	6.99 - 9.99	20 8.28	
Private Brand	5.99 - 7.99	110 7.03							
Category 2									
Processor Brand	4.29 - 5.99	240 5.80	4.99	30 4.99					
Private Brand	5.99	160 5.99							
SELF-SERVICE DELI									
(dollars per tub or pouch)									
Turkey 7-10 oz									
Processor Brand	1.99 - 4.19	1,550 2.81	1.99 - 2.69	1,670 2.92	2.49 - 3.33	870 2.74	2.49 - 3.99	600 2.94	
Private Brand	2.47 - 3.33	1,350 2.78	2.50 - 3.00	960 2.70	2.50 - 2.99	690 2.79	2.50 - 3.00	290 2.86	
Turkey 16 oz	0.00 5.00	400 504	1.00	400 400					
Processor Brand	3.98 - 5.29	400 5.04	4.99	100 4.99					
Private Brand									
Chicken 7-10 oz	1.00 4.40	1.500 0.00	1.00 0.50	1.510 0.00	2.40 2.22	970 974	2.40 2.00	600 2.04	
Processor Brand Private Brand	1.99 - 4.19 2.47 - 3.33	1,500 2.80 1,350 2.78	1.99 - 2.50 2.50 - 3.00	1,510 2.96 960 2.70	2.49 - 3.33 2.50 - 2.99	870 2.74 690 2.79	2.49 - 3.99 2.50 - 3.00	600 2.94 290 2.86	
Filvate Dialiu	2.41 - 3.33	1,330 2.70	2.50 - 5.00	900 2.70	2.50 - 2.55	030 2.79	2.00 - 3.00	230 2.00	

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)